

OFFICE OF LOGISTICS FY-89 PLANNING CALENDAR AND PLANNING GUIDE

PREPARED BY THE INFORMATION AND MANAGEMENT SUPPORT STAFF/OL

OFFICE OF LOGISTICS PLANNING CALENDAR

REVISED OL PLANNING CALENDAR FOR REMAINDER OF FY 88
For OL Planning Officers

- * 1 Sep 88 - Responses are due in IMSS from designated components on issues related to Reducing Transactional Costs.
- 1 Sep 88 - IMSS to deliver all updated material for OL "Yellow Pages" to OL/P&PG for printing.
- * 9 Sep 88 - Suggested topics and speakers for the 4th Qtr FY 88 OL Quarterly are due in IMSS from groups, divisions, and staffs.
- *20 Sep 88 - Reports of FY 88 activities (with graphics) are due from groups/divisions/staffs - to be used in making a video for the 4th Qtr FY 88 OL Quarterly and for other briefings. (Reports of 4th Qtr FY 88 activities are to be kept by groups, divisions, and staffs but need not be sent to IMSS.)
- *27 Sep 88 - FY 92 R&D requirements are due from groups, divisions and staffs - for submission (via the DDA) to DS&T. (This is a tentative date.)
- *30 Sep 88 - Updated milestone charts, as of the end of the 4th Qtr FY 88, for each FY 88 Directorate- and Office-level objective, are due from groups, divisions and staffs.

*Date items are due in IMSS

OL PLANNING CALENDAR - FY 89
For OL Planning Officers

- * 3 Oct 88 - Updated OL "Yellow Pages" are due in IMSS from OL/P&PG for distribution by OC/OL-ISC.
- * 6 Oct 88 - Statistics for FY 88 (for video) are due in IMSS from OL groups/divisions/staffs. (Statistics for the 4th Qtr FY 88 should be kept by OL groups/divisions/staffs but need not be sent to IMSS.)
- * 6 Oct 88 - (1) Proposed additional budget initiatives for FY 91 and new budget initiatives for FY 92 are due in IMSS from groups/divisions/staffs - for discussion at the OL Planning Conference in October.

(2) Proposed Directorate- and Office-level objectives for FY 89, along with projects for FY 89 and studies for FY 89, are due in IMSS from groups/divisions/staffs, for discussion at the OL Planning Conference.
- *11 Oct 88 - Statistical slides for FY 88 are due in IMSS from D&PC/P&PG. After reviewing them, IMSS will deliver the slides to Video Section/P&PG for inclusion in the video to be shown at the 4th Qtr FY 88 OL Quarterly.
- 18/19 Oct 88 OL Planning Conference.
- *21 Oct 88 - Video is due in IMSS from Video Section/P&PG - to be reviewed by IMSS prior to showing at the Dry Run of the 4th Qtr FY 88 OL Quarterly.
- 24 Oct 88 - Dry Run of OL Quarterly for the 4th Qtr FY 88 - 10 a.m., Building
- 25 Oct 88 - OL/SG should send a memo to groups/divisions/staffs requesting response to a request from Safety Division/OMS re OSHA report. (This is a tentative date.)
- 3 Nov 88 - 4th Qtr FY 88 OL Quarterly - 10 a.m., Headquarters Auditorium

*Date items are due in IMSS.

FY 89 OL Planning Calendar for OL Planning Officers (cont'd)

STAT 4 Nov 88 - 4th Qtr FY 88 OL Quarterly - 10 a.m.,
Building

* 7 Nov 88 - Revised list of proposed additional budget initiatives for FY 91, new budget initiatives for FY 92, and proposed objectives, projects, and studies for FY 89 are due in IMSS from groups/divisions/staffs.

16 Nov 88 - Responses are due in OL/SG from groups, divisions, and staffs regarding OSHA report for OMS/Safety Division. (This is a tentative date.)

*22 Nov 88 - Updates to the OL Five-Year Plan for FY 88-92 (for preparation of the OL Five-Year Plan, FY 89-93), including:

(1) Milestone charts for each new FY 89 objective:

- ° Designated as Directorate- or Office-level.
- ° Ranked (per D/L's Action Plan 1986/1988 or updated plan) Group A (Critical), Group B (Essential), or Group C (Important).

(2) Lists of projects and studies for FY 89.

(3) Lists of additional budget initiatives for FY/91 and new budget initiatives for FY 92.

(4) Updates to the narrative portions (Introduction, Assumptions, Goals, Resource Implications, and OL's projections for the future).

* 9 Dec 88 - Suggested topics and speakers for the 1st Qtr FY 89 OL Quarterly are due in IMSS from groups, divisions, and staffs.

*20 Dec 88 - Reports of 1st-Qtr FY 89 significant activities (with graphics) are due in IMSS from groups/divisions/staffs - to be used in the update of significant activities at the OL Quarterly.

*Date items are due in IMSS.

FY 89 OL Planning Calendar for OL Planning Officers (cont'd)

- *22 Dec 88 - Responses are due in IMSS from groups, divisions, and staffs, giving input for DCI's Annual Report to Congress (usually due in the DDA's office by the end of December). (This is a tentative date.)
- *30 Dec 88 - Updated milestone charts are due in IMSS from groups/divisions/staffs, as of the end of the 1st Qtr FY 89, for each Directorate- and Office-level objective.
- Jan 89 - IMSS to submit one-page summary descriptions of proposed new initiatives to DDA for Comptroller.
- * 6 Jan 89 - Statistics for the 1st Qtr FY 89 are due in IMSS from groups/divisions/staffs for the OL Quarterly.
- *12 Jan 89 - Slides for 1st Qtr FY 89 OL Quarterly are due in IMSS from D&PC/P&PG.
- 13 Jan 89 - Dry Run of the 1st Qtr FY 89 OL Quarterly - 2 p.m., Building
- 26 Jan 89 - 1st Qtr FY 89 OL Quarterly - 10 a.m., Headquarters Auditorium
- 27 Jan 89 - 1st Qtr FY 89 OL Quarterly - 10 a.m., Building
- Jan/Feb 89 - Comptroller review of proposed new initiatives.
- Feb 89 - OL Executive Conference. (Date to be determined.)
- Feb 89 - IMSS to submit updates of ongoing initiatives to DDA for Comptroller. (Date to be determined.)
- *10 Mar 89 - Suggested topics and speakers for the 2nd Qtr FY 89 OL Quarterly are due in IMSS.
- *20 Mar 89 - Reports of 2nd-Qtr FY 89 significant activities are due in IMSS from groups/divisions/staffs - to be used in the update of significant activities at the OL Quarterly.

*Date items are due in IMSS

FY 89 OL Planning Calendar for OL Planning Officers (cont'd)

- *31 Mar 89 - Updated milestone charts, as of the end of the 2nd Qtr FY 89, for each Directorate- and Office-level objective are due in IMSS from groups, divisions, and staffs.
- * 3 Apr 89 - Text and graphics for the OL Annual Report are due in IMSS from groups/divisions/staffs.
- * 6 Apr 89 - Statistics for 2nd Qtr FY 89 are due in IMSS from groups/divisions/staffs for the OL Quarterly.
- ___ Apr 89 - IMSS to submit DA Standard Support Requirements initiatives to DDA for Comptroller.
- *12 Apr 89 - Slides for 2nd Qtr FY 89 OL Quarterly are due in IMSS from D&PC/P&PG.
- 14 Apr 89 - Dry Run OL Quarterly for the 2nd Qtr FY 89 - 2 p.m., [] Building
- 27 Apr 89 - 2nd Qtr FY 89 OL Quarterly - 10 a.m., Headquarters Auditorium
- 28 Apr 89 - 2nd Qtr FY 89 OL Quarterly - 10 a.m., [] Building
- * ___ May 89 - The dylux of the OL Annual Report is due in IMSS for review by IMSS and the D/L before preparation by P&PG of the final proofs.
- * ___ May 89 - The proofs of the OL Annual Report are due in IMSS from P&PG for review by IMSS before printing.
- *30 May 89 - Updated portions of the OL Emergency Procedures are due in IMSS from groups/divisions/staffs.
- * 8 Jun 89 - Suggested topics and speakers for the 3rd Qtr FY 89 OL Quarterly are due in IMSS.
- *20 Jun 89 - Reports of 3rd Qtr FY 89 significant activities are due in IMSS from groups/divisions/staffs - to be used in activities update at OL Quarterly.

*Date items are due in IMSS.

FY 89 OL Planning Calendar for OL Planning Officers (cont'd)

22 Jun 89 - P&PD will distribute OL Annual Report at the Kickoff to the OL Conference at Headquarters Auditorium.

22 Jun 89 - Kickoff to the OL Conference - 10 a.m.,
Headquarters Auditorium

23 Jun 89 - Kickoff to the OL Conference - 10 a.m.,
Building

*26 Jun 89 - Updated OL Emergency Procedures material is due in IMSS from groups/divisions/staffs.

27/28 Jun 89 OL Conference

29/30 Jun 89 OL Conference

*30 Jun 89 - Updated milestone charts, as of the end of the 3rd Qtr FY 89, for each Directorate- and Office-level objective are due in IMSS from groups, divisions, and staffs.

* 5 Jul 89 - Statistics for the 3rd Qtr FY 89 are due in IMSS from groups/divisions/staffs - for the OL Quarterly.

*14 Jul 89 - Slides for the 3rd Qtr FY 89 OL Quarterly are due in IMSS from D&PC/P&PG.

17 Jul 89 - Dry Run of the OL Quarterly for the 3rd Qtr FY 89 - 2 p.m., Building

27 Jul 89 - 3rd Qtr FY 89 OL Quarterly - 10 a.m., Headquarters Auditorium

28 Jul 89 - 3rd Qtr FY 89 OL Quarterly - 10 a.m.,
Building

* 2 Aug 89 - Updated portions of the "OL Yellow Pages" are due in IMSS from groups/divisions/staffs.

*11 Sep 89 - Proposed topics and speakers for the 4th Qtr FY 89 OL Quarterly are due in IMSS from groups, divisions, and staffs.

*Date items are due in IMSS.

FY 89 OL Planning Calendar for OL Planning Officers (cont'd)

- *20 Sep 89 - Report of FY 89 activities (with graphics) are due in IMSS from groups/divisions/staffs - to be used in making a video for the OL Quarterly for the 4th Qtr FY 89 and for other briefings. (Reports of 4th Qtr FY 89 activities are to be kept by groups, divisions, and staffs but need not be sent to IMSS.) (Comparison of statistics for FY 89 and FY 88 still to come--due 5 October.)
- *27 Sep 89 - FY 93 R&D requirements are due in IMSS from groups/divisions/staffs - for submission (via the DDA) to DS&T. (This is a tentative date.)
- *29 Sep 89 - Updated milestone charts, as of end of the 4th Qtr, for each FY 89 Directorate- and Office-level objective are due in IMSS from groups, divisions, and staffs.

*Date items are due in IMSS.

OFFICE OF LOGISTICS PLANNING GUIDE

OL PLANNING GUIDE

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OL PLANNING CONFERENCE - FALL

1. The Fall OL Planning Conference usually takes place in October at an approved out-of-town conference site. This year, it will be held on 18 and 19 October 1988 at the Westinghouse Conference Center and the Guest Quarters Suite Hotel in Linthicum, Maryland. Attendees will include the D/L, DD/L, EO/OL, AEO/OL, all OL group/division/staff chiefs, the C/B&FB, and the Planning Officer/IMSS.

2. In addition to general issues that affect OL's responsiveness and efficiency, proposed "additional budget initiatives" for FY 91, "new budget initiatives" for FY 92, Directorate- and Office-level "objectives" for FY 89, "projects" for FY 89, and "studies" for FY 89 will be discussed and selections made.

3. Before the planning conference, C/IMSS will send a memorandum to OL group/division/staff chiefs and the C/B&FB requesting suggested initiatives, objectives, projects, and studies by 6 October, along with a brief summary of each item in order to facilitate the discussion process.

4. After the planning conference, OL group/division/staff chiefs and the C/B&FB are required to submit a revised list of the proposed initiatives, objectives, projects, and studies to IMSS by 7 November for review by the D/L. This revised list should reflect the revisions agreed upon at the planning conference (i.e., title changes, objective tracking level changes, additions or deletions to the list, etc.). The D/L will review the revised list, and then IMSS will send the approved revised list to the OL components. Based on this list, OL components will submit properly formatted milestone charts for the approved objectives to IMSS by 22 November.

5. The OL Planning Officer, OL group/division/staff chiefs, and the C/B&FB will meet to prioritize all of the proposed OL initiatives and prepare a joint recommendation for final selection and ranking by the D/L for submission to the DDA. Following this meeting, the same group will meet with the D/L, and the prioritized list will be revised/finalized and then submitted to the DDA. Initiatives will be handled thereafter by the C/B&FB, with the assistance of the Planning Officer/IMSS. (Please see separate instructions and samples under the headings "Initiatives," "MBOs and Milestone Charts," and "Projects and Studies.")

INITIATIVES

1. Annually, the C/IMSS sends a memorandum to OL group/division/staff chiefs and the C/B&FB, requesting budget initiatives for discussion at the OL Planning Conference held in the fall. This year IMSS will ask that additional budget initiatives for FY 91 and new budget initiatives for FY 92 be submitted to IMSS by 6 October for discussion at the 1988 Fall OL Planning Conference to be held on 18 and 19 October at the Westinghouse Conference Center and Guest Quarters Suite Hotel in Linthicum, Maryland.

2. After the conference, OL group/division/staff chiefs and the C/B&FB are required to submit a revised list of the proposed initiatives, objectives, projects, and studies to IMSS by 7 November for review by the D/L. This revised list should reflect the revisions agreed upon at the Fall OL planning Conference (i.e., title changes, objective tracking level changes, additions or deletions to the list, etc.). The D/L will review the revised list. Thereafter, IMSS will send the list of proposed initiatives to OL group/division/staff chiefs, who are then responsible for preparing a properly formatted justification for each initiative (sample attached) that includes the title, date of full operational capability, cost estimates for positions and funds for the number of years involved, problems to be addressed, statement of the proposal, and the coordination required. IMSS will inform OL group/division/staff chiefs regarding the date these forms are due in IMSS as soon as this information is available.

3. The OL Planning Officer, OL group/division/staff chiefs and the C/B&FB will then meet to prioritize all of the proposed OL initiatives and prepare a joint recommendation for final selection and ranking by the D/L for submission to the DDA. Following this meeting, the same group will meet with the D/L, and the prioritized list will be revised/finalized and then submitted to the DDA. Initiatives are handled thereafter by the C/B&FB, with the assistance of the Planning Officer/IMSS. Approved initiatives will be included in the budget.

Attachment:
Sample of format

DDA/OL

(Title of Initiative)

Cost Estimate

FY	FY	FY	FY	FY
<u>89</u>	<u>90</u>	<u>91</u>	<u>92</u>	<u>93</u>

Positions:
Funds:

Problem to be Addressed:

Proposal:

Coordination:

OBJECTIVES AND MILESTONE CHARTS

1. In late summer, the C/IMSS asks OL group, division, and staff chiefs to submit at least a few suggested Directorate- and Office-level objectives from each component for the coming fiscal year. These are discussed at the Fall OL Planning Conference, and selections are made shortly thereafter. Groups/divisions/staffs are asked at that time to prepare milestone charts for the MBOs chosen.

2. The C/IMSS will request that each group/division/staff chief submit to IMSS by 6 October a minimum of three or four major, prioritized objectives for FY 89 in support of the D/L's most recent "Action Plan". In addition, one or two personnel-related objectives should be submitted from each component in recognition of the fact that quality personnel management is OL's most important goal and that OL is committed to making its career service the best in the Agency. Included should be a title and brief narrative description of the proposed objective, plus the category of the objective it supports--Group A (Critical), B (Essential), or C (Important).

3. After the planning conference, group/division/staff chiefs are required to submit a revised list of the proposed initiatives, objectives, projects, and studies to IMSS by 7 November for review by the D/L. This revised list should reflect the revisions agreed upon at the Fall OL Planning Conference (i.e., title changes, objective tracking level changes, and additions or deletions to the list, etc.). The D/L will review the revised list, and IMSS will then send the approved revised list to the OL components. Detailed milestone charts for each chosen objective are due in IMSS by 22 November 1988.

4. When selecting possible objectives, keep in mind that an objective should not be contingent on additional resources (either funding or personnel). It should be achievable within present resources and worded to encompass only what can be accomplished during a single fiscal year (even though an overall objective actually may span more than one year).

5. A sample format for milestone charts is attached. So that all milestone charts are uniform, please do the following:

- Center either "Directorate-level" or "Office-level" at the top.
- After "quarter ending," insert the proper date for the end of the quarter being reported upon; i.e., 31 Dec 8-, 31 Mar 8-, 30 June 8-, etc.

Objectives and Milestone Charts (continued)

- In the upper right-hand corner, indicate whether it is Group A, B, or C (Critical, Essential, or Important - per the D/L's Action Plan).
- Begin each milestone activity with a verb, such as "develop," "prepare," "initiate."
- Enter an "X" in the month(s) where your scheduled "O" milestone has been accomplished or put dashes between the scheduled "O" milestone to the month of the anticipated new rescheduled completion; e.g., "O"-----"O". If a scheduled milestone was not met, it's important that you explain why. Also please include, at the bottom or on the back of the page, a very short note giving the updated status, etc., for the quarter being reported on.
- Be sure to include the classification at the top and bottom of the page.

5. IMSS keeps a list of the Directorate- and Office-level MBOs along with a copy of all milestone charts. IMSS assigns a number to each MBO when the list is compiled at the beginning of each fiscal year; this number should be used on the milestone chart when it is updated or referred to.

6. Updated milestone charts are due in IMSS on the following dates:

- 31 Dec 8_ - end of 1st Qtr of each fiscal year.
- 31 Mar 8_ - end of 2nd Qtr of each fiscal year.
- 30 Jun 8_ - end of 3rd Qtr of each fiscal year.
- 30 Sep 8_ - end of 4th Qtr of each fiscal year.

7. OL group/division/staff chiefs should be prepared to brief the D/L on MBOs at their first biweekly meeting after the end of each quarter unless otherwise notified. (The C/P&TS and C/SS review their MBOs with the DD/L and Procurement Executive, respectively.)

Attachment:
Sample milestone chart

PROJECTS AND STUDIES

1. In late summer, the D/L asks OL group/division/staff chiefs to submit to the C/IMSS at least a few suggested projects and studies from each component for the coming fiscal year. These are discussed at the Fall OL Planning Conference, and selections are made shortly thereafter.

2. Group/division/staff chiefs should submit to IMSS by 6 October prioritized lists of projects and studies for FY 89 in support of the D/L's most recent "Action Plan." Included should be a title and brief narrative description of the proposed project or study.

3. Projects and studies should not be contingent on additional resources (either funding or personnel). They should be achievable within present resources and worded to encompass only what can be accomplished during a single fiscal year (even though a project or study actually may span more than one year).

4. A project is a tasking agreed upon by the D/L and the component head and will be reported on in their biweekly meetings when significant updates are deemed necessary by either the D/L or the component heads.

5. A study is a research effort into the feasibility or practicality of an idea that could ultimately become a project, objective, or even an initiative.

OL QUARTERLY

1. The OL Quarterly is usually held approximately one month after the end of each quarter of the fiscal year. It is given twice each quarter on consecutive days--in the Headquarters Auditorium on the first day and in Room Building on the second day. A "Dry Run" takes place approximately 10 days prior to the OL Quarterly. We suggest that speakers also have a "Dry Run" with their group, division, or staff chief before the formal one with the D/L.

2. At the Quarterly held in the Headquarters Auditorium, the DDA presents awards to the OL Employees of the Quarter. Subsequently, individual speakers give their presentations; the C/P&TS/OL speaks briefly on general personnel topics; the C/IMSS sometimes gives a short update on OL activities for the quarter or a video is shown depicting significant accomplishments for the year following the 4th quarter; and then a question-and-answer period follows closing remarks by the D/L.

3. Reports on quarterly activities for the first three quarters are usually due in IMSS by the 20th of the last month of the quarter being reported upon; i.e., 20 December for the 1st Qtr, 20 March for the 2nd Qtr, and 20 June for the 3rd Qtr.

4. At the OL Quarterly for the 4th quarter FY 87, a video was shown depicting OL significant accomplishments for FY 87 rather than activities for the 4th quarter only. Reports of significant accomplishments for FY 88 (along with appropriate graphics) and appropriate statistical comparisons with FY 87 should be forwarded to C/IMSS by 20 September and 6 October, respectively, for preparation of the video. Records regarding 4th quarter activities, along with appropriate statistical comparisons for the quarter, should be maintained by groups/divisions/staffs; but these need not be sent to C/IMSS.

5. Quarterly reports should consist of descriptive narratives on activities or accomplishments, including routine, bread-and-butter functions and, when the subject permits, an appropriate picture, slide, or draft recommended graphic; substantial cost savings realized or anticipated; large or special support projects; and other activities performed under unusual or especially difficult circumstances or in a particularly timely manner. Appropriate statistical comparisons with the same quarter of the previous year (or with the entire previous year in the case of the 4th quarter) should be forwarded separately by the sixth of the month following each quarter.

OL Quarterly (continued)

STAT 6. Suggested topics for the OL Quarterly should be forwarded to IMSS about three weeks before the end of each quarter or may be telephoned to the IMSS Planning Officer, [] or [] at any time. The subjects should be educational and/or help logisticians to do their jobs better. The group/division/staff suggesting a topic should be prepared to furnish a speaker to make the presentation at the next quarterly meeting. The speaker should have appropriate slides made and should forward them to IMSS prior to the "Dry Run" mentioned in paragraph 1.

BRIEFING POINTERS for OL QUARTERLIES

1. Know your subject thoroughly.
2. Be sure your presentation is appropriate for the audience and location.
3. Use slides instead of vugraphs. Coordinate with [] [] Design & Presentations Center, P&PG, GJ4008 HQ, extension [] early, for guidance/suggestions on your slides. Remember that P&PG must have time to work on them and that you'll need them for the "Dry Run" with the D/L (item 11 below).
4. Keep the slides simple. They should add to, not be, the presentation. Make sure all are of uniform good quality in bright, contrasting colors and with large printed text. They should be horizontal pictures, not vertical.
5. If you'll use notes, have them typed double-spaced on 8 1/2- x 11-inch paper for insertion into a notebook (which IMSS will prepare and have ready for use on the speaker's stand), but DO NOT READ NOTES--MEMORIZE THEM.
6. Practice your presentation in front of a mirror. Time your talk with your visual aids. To keep to the one hour allotted, it's essential to hold your presentation to 10 minutes or less.
7. When you begin, introduce yourself and state what you'll be talking about. When you finish, introduce the next speaker ("Our next speaker will be _____" or "I'll be followed by _____," etc.).
8. Face the audience, not the slides. Glance at each slide to make sure it's the correct one and, if suitable, use a pointer. (If you plan to use the electric-beam pointer in the HQ Auditorium, practice with it beforehand. This pointer is hard to control; to keep it from dancing all over the screen, point it toward the floor when you're not actually pointing.)

Briefing Pointers for OL Quarterlies (continued)

- STAT
9. In [] Building you'll have a remote device that you can operate yourself to change your slides (practice with this just before the "Dry Run"). In HQ Auditorium you must press hard on the button on the right-hand side of the lectern top to signal the control-booth operator to change the slides (meaning you won't have quite the same instantaneous response as at [] Building). You can practice with this the day of the presentation.
10. Inject some humor if possible. Tell a brief anecdote if appropriate.
11. Have a "Dry Run" with your group/division/staff chief and/or the IMSS Planning Officer before the official "Dry Run" with the D/L.
- STAT
STAT
12. On the day of the official "Dry Run," arrive at [] Building about one hour early to allow time to insert your slides into the slide tray (if you have not already forwarded the slides to IMSS). Run through them once and test the sound level for your voice. (Be sure to number your slides in the order in which they are to appear in the tray.)
- STAT
STAT
13. Remember that you'll be making your presentation both days of the Quarterly--in the HQ Auditorium and in [] Building.
14. For the actual presentations, arrive at least one hour early if you're bringing your slides, 30 minutes early if they're already in the tray.
15. Enjoy yourself. We're all "family."

SIGNIFICANT ACCOMPLISHMENTS

1. Quarterly reports of significant accomplishments for the first three quarters of the fiscal year are due in IMSS by the 20th of the last month of each quarter being reported upon. These reports (along with appropriate graphics, if any) should contain a very brief summary (topic and two- to -three sentence concise description of each component's significant accomplishments for the quarter. Appropriate statistical comparisons with the same quarter of the previous year are due in IMSS by the 6th of the month following the quarter being reported upon.

2. An annual report of significant accomplishments for Fiscal Year 1988 is due in IMSS from each group, division, and staff on 20 September 1988. These reports should be prepared as described in paragraph 1, but should cover significant accomplishments for FY 88 in lieu of the 4th Quarter FY 88. Appropriate statistical comparisons with FY 87 should be sent to IMSS by 6 October. Submissions for FY 88 will be used to prepare a video overview of OL's accomplishments during the past fiscal year--to be shown at the November 1988 OL Quarterly.

3. OL components should keep records of significant accomplishments and statistics for the 4th Quarter of the fiscal year, but they need not send them to IMSS.

4. To facilitate preparation of the report, OL components should consider inputting this information into the Wang on a weekly basis (perhaps selecting such items when preparing their own Weekly Report). Thus, the data would be in a document on the Wang when the reports of significant accomplishments--and quarterly activities--are required.

FIVE-YEAR PLAN

1. The first step in updating the OL Five-Year Plan is taken in the fall each year, when IMSS sends OL group/division/staff chiefs copies of the D/L's most recent Action Plan, along with the current OL Five-Year Plan. The latter addresses OL's assumptions and goals (which support those of the DA) five years into the future, including the projected outlook for requirements levied on OL; OL's financial and personnel resources, space, and facilities; OL's goals for meeting those requirements with the resources anticipated; and OL's projections for the future.

2. Recipients are asked to update the narrative portions of the plan in conformance with the D/L's Action Plan and prepare milestone charts for each new FY 89 objective. To assist OL components, IMSS sends a list of the proposed Directorate- and Office-level objectives, budget initiatives, projects, and studies for the coming year (discussed at the October OL Planning Conference). The revised narrative, list of objectives (with milestone charts for each), and lists of budget initiatives, projects, and studies become OL's new Five-Year Plan.

3. Groups/divisions/staffs must send to IMSS by 22 November the following:

- a. Your milestone charts for new objectives for FY 89.
- b. Your list of approved additional initiatives for FY 91 and new initiatives for FY 92.
- c. Your list of approved projects and studies for FY 89.
- d. Your suggested updates (for the next five-year period) to the narrative portions of the current OL Five-Year Plan (i.e., Introduction, Assumptions, Goals, Resource Implications, and OL's projections for the future).

4. Milestone charts should be prepared in accordance with instructions in the "MBOs and Milestone Charts" portion of this planning guide. (Properly formatted justifications for additional initiatives for FY 91 and new initiatives for FY 92 should be prepared when directed to do so, but these forms are not included in the Five-Year Plan.)

RESEARCH AND DEVELOPMENT PLANNING CYCLE

1. The objective of the DS&T Research and Development (R&D) planning process is to plan a coordinated program of research, development, and engineering that responds to the needs of the Intelligence Community and continues the advancement of state-of-the art technology. The Planning and Resources Staff (P&RS), DS&T, begins the process by requesting prioritized requirements from customer organizations.

2. IMSS forwards memoranda from the DDA and P&RS/DS&T, along with appropriate attachments, to OL components for review, and requests that any ideas for research and development be submitted to IMSS in time to meet the suspense date set by the DDA. We have shown a tentative due date of 27 September 1988 on the Planning Calendar, but this is subject to change. IMSS will advise you as soon as this information is received.

DCI - ANNUAL REPORT TO CONGRESS

1. Usually in December each year, OL is asked to give the DDA information for inclusion in the DCI's Annual Report to Congress. OL's response is usually due approximately one week after receipt of the request from the DDA. For planning purposes, we have therefore scheduled receipt of reports in IMSS from groups/divisions/staffs for 22 December. This is subject to change depending upon the tasking received from the DDA. IMSS will give you details in this regard as soon as we receive them.

2. In 1987 we were requested to respond to two categories:

a. Consumer Demands--focusing on new requirements placed on us by consumers that have significantly affected resources.

b. Intelligence Support--focusing on support to activities such as operations or crises, arms control, counterterrorism, narcotics, CI, security, contingency capabilities, weapons research, policymaking, etc.

3. Appropriate photographs or other graphics were requested for possible inclusion in the final report.

4. As suggested under the heading of "Significant Accomplishments," weekly recording on the Wang of significant accomplishments (perhaps when writing the Weekly Report) would also help in preparing OL's submission to the DDA for the DCI's Annual Report to Congress.

EXECUTIVE CONFERENCE

1. The Executive Conference in late winter is for the purpose of discussing some "gut" issues and problems that confront individual offices in OL, as well as to assess our past responsiveness, efficiency, and potential for future improvements. Like the Fall OL Planning Conference, it is usually held at an out-of-town conference facility. However, the only participants are the D/L, DD/L, and EO/OL, plus group/division chiefs and the C/IMSS. Since it is intended to foster as much communication as possible, the schedule is very flexible, and no official transcript is made of the meetings.

2. The AEO/OL is the conference coordinator.

OL EMERGENCY PROCEDURES MANUAL

1. The OL Emergency Procedures Manual is intended to provide essential guidance and appropriate contact information needed to handle emergency situations in the Washington Metropolitan Area.

2. Some of the information contained therein is perishable; therefore, IMSS usually sends copies of pertinent sections to the groups/divisions responsible for emergency actions on the Headquarters Compound and at Agency-occupied external buildings for updating by 30 May. The manual should be updated at other times of the year in response to major component reorganizations or procedural changes.

3. The information contained in the manual has been input into the Wang in IMSS. Groups/divisions are responsible for updating their portion of the manual and sending it via telecommunications to IMSS for inclusion in the master file and for distribution by IMSS to holders of the manual.

4. Each OL group/division/staff has been provided with a copy of the OL Emergency Procedures Manual. Duty officers should be informed of its location.

OFFICE OF LOGISTICS "YELLOW PAGES"

The Office of Logistics (OL) "Yellow Pages" are intended as a handy reference guide to the many services OL provides for the Agency, both in the field and in the Headquarters and external Agency-occupied buildings in the Metropolitan Washington Area.

2. This minidirectory will be updated as needed by reprinting either the entire document or only individual pages, depending on the frequency and extent of changes to be made. Updated information was due in IMSS by 2 August 1988. The target date for distribution of the revised "Yellow Pages" is 3 October 1988.

EXCELLENCE

1. The former DCI's program in pursuit of excellence in the Agency was ongoing. Initially, the DCI solicited suggestions regarding ways to increase or further excellence in the Agency. However, later requests were for examples of excellence manifested by initiatives taken by, or the outstanding performance of, individuals or components. While we don't know whether or not the present DCI will continue the "Excellence" program, we should be prepared to provide examples if requested to do so.

2. As to the format, unless directed otherwise, information should be provided in a brief descriptive paragraph noting the name(s) of the individual(s) concerned, the grade and job title of the employee(s) concerned, what was involved, and why the example is worthy of recognition. Included as a separate paragraph should be a statement noting what, if any, recognition was made of this event (realizing that in many cases, such examples do not merit specific cash awards, etc., but are simply employees doing their job in an outstanding fashion).

3. Supervisors should recognize sustained superior performance, initiative and/or excellence by suggesting appropriate awards. Group/division/staff chiefs also should remind employees periodically to seek ways to improve Agency operations and to make suggestions in this regard.

4. With these periodic requirements in mind, we suggest that you keep a current, ongoing record of individual/component excellence within your division/staff.

5. The Director of Logistics includes in the weekly OL Notes & Quotes information regarding recipients of awards and letters of appreciation. The Planning Officer/IMSS receives a copy of the notes and maintains a file on them for future reference.